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L A T E C A B L E S

Second official estimate 1940-41 Argentine cotton production placed at 227,000 bales compared with first estimate of 369,000 bales and final 1939-40 estimate of 362,500 bales. Low current estimate attributed to frequent rains, low temperature, and insect damage.

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Declared exports of Spanish pickled olives from the Seville consular district for the month of March 1941 were as follows, with 1940 comparisons in parentheses: in brine, 335,856 gallons (474,666); pitted and stuffed, 425,852 gallons (266,699). These were composed of 481,136 gallons (439,346) of Queens and 280,572 (322,019) of Manzanillas.

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Kenya, East Africa, pyrethrum flower production is being restricted to about 7,000 short tons annually on account of large surplus supply.

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G R A I N S

WORLD WHEAT SEEDINGS
APPEAR SOMEWHAT REDUCED
BUT RYE INCREASED . . .

Estimates of seedings for the 1941 wheat crop in 17 Northern Hemisphere countries total 2.5 percent below the comparable figure for 1940. Because of the 25-percent reduction indicated by farmers' intentions to seed spring wheat in Canada, it appears that the North American wheat acreage will be about 7 percent smaller this year, despite the increase in seedings of winter wheat in the United States. According to figures now available, the total wheat acreage of the United States for harvest in 1941 will be about 55 million acres as compared with 53.5 million in 1940, while Canada will have 21.7 million acres as against 28.7 million in 1940. The combined acreage of the two countries will approximate 76.5 as compared with 82.2 million acres last year.

WHEAT AND RYE: Acreage in specified countries,
1939-1941

Country and item	1939	1940	1941	Percentage 1941 is of 1940
	1,000 acres	1,000 acres	1,000 acres	Percent
<u>Wheat</u>				
United States: Winter..	38,078	36,147	40,313	111.5
Spring..	15,404	17,356	a/ 14,508	83.6
Total b/	53,482	53,503	54,821	102.5
Canada:.....Winter..	735	775	581	75.0
.....Spring..	26,021	27,951	21,074	75.4
.....Total b/	26,756	28,726	21,655	75.4
Europe (12 countries) c/	44,007	42,453	43,653	102.8
Egypt	1,501	1,563	1,564	100.0
India d/.....	33,167	33,465	34,108	101.9
Japan.....	1,827	2,062	1,983	96.2
Total (17 countries)...	160,740	161,772	157,784	97.5
<u>Rye</u>				
United States.....	3,832	3,192	3,527	110.5
Canada.....	1,102	1,035	916	88.5
Europe (11 countries) c/	17,477	16,600	17,200	103.6
Total (13 countries)...	22,411	20,827	21,643	103.9

Official estimates for countries shown separately; European total includes official estimates and unofficial estimates based on best information available. a/ Intended area less the average abandonment during 1930-1939, excluding the abnormal years of 1934 and 1936. b/ Acreage harvested or for harvest. c/ Mostly winter seedings. d/ April estimates.

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Very few complete, or official, estimates have been received for European countries, but winter seedings have been reported for several important areas, which, with unofficial data from various observers, indicate an increase in acreage of about 3 percent in 12 countries reporting either winter or total seedings for 1941. In 1939, which may be considered a more normal year than 1940, these same countries accounted for about 58.5 percent of the total wheat acreage harvested in Europe, but under present conditions seeding data may not have the same significance as in earlier years.

The only estimate from North Africa was for Egypt, which showed practically no change this year from last. In Asia, the third acreage estimate for India was about 2 percent higher than the revised figure for 1940, but the first estimate of production showed a slight decrease. In Japan, seedings were reported nearly 4 percent below those of 1940, and crop prospects have been somewhat adversely affected by labor and fertilizer shortages.

Seedings of rye for harvest in 1941, as indicated for 13 Northern Hemisphere countries, have been increased by almost 4 percent. A decline of 11.5 percent will take place this season in Canada if farmers carry out their intentions, but an increase of 10.5 percent is expected in the United States. Available information for 11 European countries points to an increase of about 4 percent this year over last, but a decline from 1939, when the same countries harvested about 44 percent of the total European rye acreage.

No estimates of wheat seedings in Southern Hemisphere countries have been received as yet. In Argentina, where the Government reserved the right to request a reduction up to 10 percent in this year's acreage in return for the legislation guaranteeing fixed prices for last year's crop, trade reports indicate a full wheat acreage. The weather has been seasonable and field operations active, it is said. In Australia, however, lack of rain is reported to have delayed seedings and to have caused considerable concern, particularly in Western Australia, where subsoil moisture reserves are considered deficient.

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CANADIAN FARMERS PLAN TO GROW LESS WHEAT; INCREASING OTHER GRAINS . . .

The 1941 Canadian wheat acreage will be about 25 percent smaller than that of 1940, if farmers carry out their intentions, as expressed on April 30, according to the Dominion Bureau of Statistics at Ottawa. The expected decrease in the wheat area will be almost all offset by increases in the acreages intended for oats, barley, and summer fallow. Most of

the reduction in the wheat area is expected to occur in the Prairie Provinces, where the farmers are reported to be making an almost unparalleled effort to adjust their production in accordance with the Government request for a smaller wheat area. The Provinces of Manitoba and Saskatchewan reported decreases of 26 percent each, and Alberta indicated a 22-percent reduction. The area to be seeded to spring wheat in all Canada was placed at 21,074,300 acres as compared with 27,950,800 acres in 1940. The fall-sown acreage remaining for harvest was estimated at 581,200 as against 775,400 acres last year. Thus, the total wheat area will be reduced to 21,655,500 acres, or by more than 7 million acres.

Against this reduction in wheat seedings, the growers plan to increase the area of oats from 12,297,600 to 13,827,200 acres, that of barley from 4,341,500 to 5,393,000 acres, that of flaxseed from 397,400 to 555,900, and the area for summer fallow from 15,586,000 to 19,505,000 acres. The relatively small acreage intended for spring rye will be increased by 8 percent to 270,200 acres, but with a reduction in the fall-sown area remaining for harvest, the total rye acreage will be about 11 percent smaller than the 1,034,900 acres reported in 1940. Seedings of mixed grains and potato plantings will be decreased by 2 and 3 percent, respectively.

CANADA: Intended acreages of principal crops,
April 30, 1941, with comparisons

Crop	1939	1940	1941	Percentage 1941 is of 1940
	<u>1,000 acres</u>	<u>1,000 acres</u>	<u>1,000 acres</u>	<u>Percent</u>
Winter wheat <u>a/</u>	735	775	581	75.0
Spring wheat	26,021	27,951	21,074	75.4
All wheat	26,756	28,726	21,655	75.4
Winter rye <u>a/</u>	891	786	646	82.2
Spring rye	211	249	270	108.4
All rye	1,102	1,035	916	88.5
Oats	12,790	12,298	13,827	112.4
Barley	4,347	4,342	5,393	124.2
Mixed grain	1,218	1,220	1,192	97.7
Flaxseed	307	397	556	140.0
Potatoes	518	545	527	96.7
Summer fallow	-	15,586	19,505	125.1

Dominion Bureau of Statistics, Ottawa.

a/ Harvested area in 1939-1940; area for harvest in 1941.

The condition of the fall-wheat crop on April 30 was placed at 96 percent as compared with 97 on the corresponding date in 1940. Fall rye averaged 95 as against 89 a year ago. Of the spring-wheat area in

the Prairie Provinces, about 21 percent had been sown, or 5 percent more than reported on April 30, 1940, and the seeding of feed grains was slightly ahead of last year's report. In the Provinces of Ontario and British Columbia, spring seedings were much farther advanced than on April 30 of last year. In general the spring season began much earlier this year in Eastern Canada and British Columbia than in most of the western part of the country, particularly the Provinces of Manitoba and Saskatchewan.

UNITED STATES CORN EXPORTS SHARPLY REDUCED . . .

United States exports of corn during the first 6 months of the October-September 1940-41 marketing year totaled less than 8 million bushels as compared with about 25 million bushels during the corresponding period of last season. Practically all the United States corn entering export channels this year has gone to the United Kingdom. Although trade returns show only 1.2 million bushels destined for that country, exports to Canada were largely intended for the British market.

UNITED STATES: Corn exports, October-March 1940-41, with comparisons

Country of destination	October-September			October-March		
	1937-38	1938-39	1939-40	1938-39	1939-40	1940-41
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Netherlands	16,188	5,906	5,765	5,101	5,765	0
Germany	13,889	180	0	180	0	0
United Kingdom	27,865	11,287	9,517	10,304	6,191	1,207
Denmark	2,783	125	3,330	a/	3,330	0
Mexico	882	1,445	808	1,342	808	a/
Norway	810	92	422	0	422	0
Ireland	11,273	1,579	2,749	1,329	2,097	0
Belgium	4,914	303	139	258	139	0
France	80	381	a/	364	a/	0
Sweden	1,406	a/	143	a/	143	0
Canada	58,315	11,845	20,346	7,895	5,265	6,593
Other countries	1,070	737	731	570	663	6
Total	139,475	33,880	43,950	27,403	24,823	7,806

Compiled from official records, Bureau of Foreign and Domestic Commerce.
a/ Less than 500 bushels.

The total domestic supply of corn on October 1, 1940, was placed at 3,144 million bushels. This compares with 3,185 million bushels on the corresponding date of 1939. The total domestic disappearance during the October-September marketing season, 1939-40, was about 2,447 million

bushels and net exports amounted to 43.2 million, leaving a carry-over into the current season of 695 million bushels, to which was added the 1940 crop of 2,449 million bushels. More than half the corn exported last season moved out of the country during October-March. If shipments during the first half of 1940-41 represent a similar percentage of the year's total, less than 15 million bushels of corn will be exported from the United States this season.

While surplus supplies of corn are heavy in the United States, they cause less serious concern than those of record size in Argentina, where corn is usually the most important agricultural product exported. Argentina's carry-over on April 1 was the largest in the history of the country. Even after allowance has been made for storage losses, which were reported to be considerable, the official estimate of the surplus available for export on April 26 was 475 million bushels. Weekly shipments as reported by Broomhall, have been insignificant so far during this season, April-March 1941-42, and prospects for early improvement are not bright.

ECUADOR HARVESTS LARGE RICE CROP . . .

The 1941 rice crop in Ecuador is placed at more than 4 million bushels which is possibly the largest harvest on record, according to a report received from American Consul Cyril L.F.Thiel at Guayaquil. Supplies of old rice in Ecuador were sufficient only for domestic consumption until the arrival of the new crop. First deliveries of the 1941 harvest were expected on a small scale about May 1. The main rice crop is generally harvested between May and July, with a second but smaller harvest in October and November. Annual domestic consumption of rice in Ecuador is placed at 2.5 to 3 million bushels. It is estimated that about 35 million pounds of rice will be available for export from the 1941 crop. Ecuador's exports normally are shipped primarily to Peru, Bolivia, and Chile. Before the outbreak of the European war, Germany usually obtained small quantities. Recent reports indicate that a substantial quantity of Ecuadoran rice has been sold to Cuba for delivery during the summer months.

ECUADOR: Rice production, 1938-39 to 1940-41,
and exports, 1939 and 1940

Production		Exports	
Year	Quantity	Year	Quantity
	1,000 bushels		1,000 pounds
1938-39	3,494	1939	20,287
1939-40	3,044	1940	30,452
1940-41	4,015		

American consulate, Guayaquil.

V E G E T A B L E O I L S A N D O I L S E E D S

PRODUCTION OF CASTOR BEANS ENCOURAGED IN ITALY . . .

It is reported that a special campaign is being conducted in Italy to encourage the cultivation of castor beans. The authorities have established guaranteed prices as follows:

<u>Description</u>	<u>Lire per quintal</u>	<u>Cents per pound</u>
Castor beans, shelled:		
First grade	400.00	9.15
Second grade	275.15	6.29
Castor beans, unshelled:		
First grade	264.00	6.04
Second grade	165.75	3.79

Selected seed will be distributed to farmers and all necessary assistance is promised by the National Association of Growers of Oleaginous Herbaceous Plants. Reports indicate that castor oil is to be used in the production of airplane lubricants.

BRAZILIAN CASTOR-BEAN EXPORTS DECREASED; OIL INCREASED . . .

Brazilian castor-bean estimates vary considerably, but reliable sources now place the 1940 production at 165,000 short tons compared with 139,000 tons in 1939, according to information received in the Office of Foreign Agricultural Relations. A much larger harvest was anticipated, but the crop fluctuates with the export demand. The industry is suffering quite a setback due to lack of transportation. In February 1941 it was reported that more than 11,000 tons of castor beans were in the port of Bahia alone awaiting space in ships bound for the United States. Ocean freight rates have increased considerably during the past months, and storage facilities in ports are overcrowded.

BRAZIL: Castor-bean production and exports,
average 1931-1935 and annual 1936-1940

<u>Year</u>	<u>Production</u>	<u>Exports</u>	<u>Year</u>	<u>Production</u>	<u>Exports</u>
Average:	<u>Short tons</u>	<u>Short tons</u>		<u>Short tons</u>	<u>Short tons</u>
1931-1935..	99,564	40,026	1938	188,170	138,751
1936	170,517	112,496	1939	a/ 138,696	138,088
1937	184,539	132,184	1940	a/ 165,345	129,515

Brazil 1939-40, Ministry of Foreign Affairs, and American consulate,
Rio de Janeiro. a/ Preliminary.

The United States is the most important purchaser of castor beans, averaging between 42 and 63 percent of the total exports during the past 5 years. Total shipments of beans, as well as those to the United States, were below last year for the reasons mentioned above.

BRAZIL: Exports of castor beans, 1936-1940

Country of destination	1936	1937	1938	1939	1940
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United States	128,334	142,238	116,458	173,590	164,003
Belgium	34,075	50,681	32,136	12,347	331
Italy	13,380	23,468	6,847	15,985	43,455
France	26,429	20,132	34,771	20,602	-
Great Britain	22,245	20,889	51,718	21,585	-
Japan	43	753	9,263	12,187	42,025
Germany	486	2,608	7,554	5,603	5,291
Netherlands	-	3,545	18,218	13,049	1,559
Spain	-	-	-	-	1,353
Egypt	-	-	-	-	224
Others	-	49	536	1,228	789
Total	224,992	264,368	277,501	276,176	259,030

American consulate, Rio de Janeiro.

Exports of castor oil have increased rapidly in recent years. Switzerland was the most important buyer in 1939 and 1940; however, the United States also imported a small quantity. Factory consumption in the United States increased from 20 million pounds in 1934 to 54 million in 1940.

BRAZIL: Exports of castor oil, 1936-1940

Country of destination	1936	1937	1938	1939	1940
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Switzerland	-	-	-	320	791
Italy	41	-	-	132	534
Argentina	-	-	-	133	42
Norway	-	21	-	121	118
Sweden	-	-	-	103	377
Germany	758	379	25	211	356
United States	-	-	-	57	115
Others	67	46	282	209	344
Total	866	446	307	1,286	2,677

American consulate, Rio de Janeiro.

C O T T O N - O T H E R F I B E R SSPANISH COTTON MILLS
CONTINUE OPERATIONS
ON REDUCED SCALE . . .

No raw cotton arrived in Spanish ports during the month of March, but January and February arrivals from Brazil were sufficiently heavy to maintain the industry on a 3-day-week basis, according to information received in the Office of Foreign Agricultural Relations. In addition to 6,000 to 7,000 bales of Spanish cotton still in producing areas at the end of March, there were available for immediate distribution about 30,000 bales of Brazilian and small quantities of Argentine and Egyptian cotton. These stocks were believed to be sufficient to maintain mill operations at the present reduced scale until around June 1.

About 15,500 bales of North Brazilian cotton were expected to arrive late in April to complete delivery of the estimated 97,000 bales purchased in Brazil last November under special credit arrangement. The first shipment of the 120,000 bales of Argentine cotton purchased under similar terms in February 1941 is not expected to arrive until June. Negotiations for purchase of an additional 100,000 bales of Brazilian cotton are still under way. A new agreement with Argentina is also reported to be under consideration.

UNITED STATES EXPORTS OF COTTON . . .

UNITED STATES: Exports of cotton to principal foreign markets, annual
1938-39, 1939-40, and August 1 to May 8, 1939-40 and 1940-41 a/
(Running bales)

Country to which exported	Year ended July 31		Aug. 1 to May 8	
	1938-39	1939-40	1939-40	1940-41
	: 1,000 bales:	: 1,000 bales:	: 1,000 bales:	: 1,000 bales:
United Kingdom	478	2,019	1,877	356
Continental Europe	1,792	2,478	2,359	186
Total Europe	2,270	4,497	4,236	542
Japan	905	960	858	97
Other countries	393	990	881	271
Total	3,568	6,447	5,975	910
Linters	215	0	282	19
Total, excluding linters:	3,353	6,447	5,693	891
	:	:	:	:

Compiled from Weekly Stock and Movement Report, New York Cotton Exchange.
a/ Includes linters.

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T O B A C C O

UNION OF SOUTH AFRICA
MARKETS LARGER TOBACCO CROP
AT HIGHER PRICES

Final estimates of the 1940 tobacco harvest in the Union of South Africa amounted to approximately 30.4 million pounds, according to the annual report of the Secretary of Agriculture and Forestry of that country. This harvest exceeded the 1939 crop by about 1 million pounds, and established a record for the Union. Production for the year was marked by a heavy increase in the production of flue-cured tobacco, which reached an all-time high of 8 million pounds as compared with 5 million produced in 1939.

The 1939 tobacco crop was the first to be sold under complete control of the Tobacco Board. Agents were appointed in all the producing areas to receive tobacco from growers at fixed valuations, and, after curing, to sell it to the manufacturers at minimum prices also fixed by the Board. This system of marketing continued in force through the 1940 season, and in view of the increased production costs that producers had to incur as a result of war conditions, the Board and Marketing Council established the minimum selling prices of 1940 about 15 percent higher than in 1939 in the case of flue-cured and light air-cured, and 7.5 percent higher for dark air-cured.

Owing to the good crop harvested in 1940, it is estimated that tobacco growers would have received an income of £1,280,000 (\$5,094,000) for their crop, even though prices paid were no higher than those prevailing in 1939. The increases of 15 percent and 7.5 percent represent a further income of £190,000 (\$756,000) for the growers, so that the total 1940 income was approximately £1,500,000 (\$5,970,000). This figure is partly due to the increase in the production of flue-cured tobacco, which falls in the higher price category.

As the large crop of 1940 was due principally to favorable weather conditions that prevailed during the greater part of the growing season, it can hardly be regarded as a sign of permanent overproduction. This factor, however, is a contingency against which the tobacco industry is warned, continued the report, particularly in regard to dark tobacco of the lower grades, which do not find a ready market.

There is danger that price control might overencourage production unless a rational price policy is followed in relation to prices of other agricultural products. The lower grades of dark tobacco that can be grown more easily and cheaply present the greatest marketing difficulty.

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GERMANY REGULATES TOBACCO
INDUSTRY OF ALSACE . . .

Since February 1, 1941, the retail tobacco trade in Alsace has been subject to the same regulations that are in force in Germany, according to information appearing in the Frankfurter Zeitung. Thus the trade in tobacco products is limited to retailers falling in one of the following classes: (1) persons entitled to purchase direct from the manufacturer at wholesale prices, (2) small grocery stores that are supplied by the wholesale trade, and (3) inns, canteens, and organizations that buy from wholesalers and retailers. Prior to the war there were approximately 1,300 tobacco shops in Alsace, but it is expected that the enforcement of German restrictions will force a large number to close down. The provisions of the German Tax Law have been effective since February 1941, and the war tax has also been imposed.

When the Germans occupied Alsace in June 1940, there were two tobacco factories in operation - a smoking-tobacco factory and a cigar factory. All other tobacco factories had been moved to the interior in September 1939. Two cigarette factories in Strasbourg have been reopened, it is said, with some help from Hamburg. Raw tobacco for these factories was supplied partly from stocks and partly from the French Monopoly Administration in Paris.

Approximately 30 branches of German cigar factories have been established in Alsace, according to reports, and the Reich Tobacco Board is said to have placed about 66,000 pounds of tobacco at their disposal. A total of 3,500 workers are employed by the Alsatian industry.

MEXICO EXPECTS
SMALLER TOBACCO CROP . . .

Further information concerning the 1941 tobacco crop in Mexico confirms earlier forecasts that the current production will be somewhat under that of 1940, according to a report from Agricultural Attaché L. D. Mallory in Mexico City. It appears likely that this year's crop may total about 37.5 million pounds as compared with an estimated production of 50.7 million last year.

The reduction in this year's harvest is in the Tepic tobacco of the State of Nayarit. Tepic is a light air-cured Virginia type used in Mexico for the blending of cigarettes, which have become popular during past years. Production of the dark types grown in the Cordoba and Agua Dulce areas of Veracruz will probably be equal to that of last season. The fact that the current crop is somewhat under the rate of consumption, will probably reduce stocks a little, a condition desired by manufacturers.

The output of tobacco products during the current season, or since July 1, 1940, does not appear to have continued on the upward trend that has prevailed in recent years. Manufacturers indicate a seasonal pickup during the January-March quarter as compared with the previous quarter. Average production for the 9 months, however, is reported to approximate that of last year for the same period. It is likely that factory output will continue near this level until about the end of June, when the rainy season starts.

MEXICO: Consumption of leaf tobacco in factories,
1937-38 to 1940-41

Year	Domestic	Imported	Total
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
1937-38.....	37,776,326	140,797	37,917,123
1938-39.....	28,209,084	124,390	38,333,474
1939-40.....	38,670,915	207,164	38,878,079
First quarter:			
1939-40.....	9,305,061	57,240	9,362,301
1940-41.....	9,136,907	55,898	9,192,805

Direccion General de Estadistica, Secretaria de la Economia Nacional.

AUSTRALIA PLANS DUTY PREFERENTIAL
ON SOUTHERN RHODESIAN TOBACCO . . .

A bill has been introduced in the Australian Parliament to enable the carrying out of a trade agreement recently concluded between Australia and Southern Rhodesia providing for a duty preference on Southern Rhodesian tobacco of about 12.1 cents per pound. Information received in the Office of Foreign Agricultural Relations under date of March 29 was that the bill would probably be passed within the near future. Similar action by Southern Rhodesia would automatically enable the agreement to become effective.

Until now the full Australian duty has been charged on both Empire and non-Empire tobacco, and most of the country's import has been flue-cured leaf from the United States, averaging about 20 million pounds during the year 1937-1939. The establishment of the preference on Southern Rhodesian leaf would, no doubt, operate to curtail the import of American leaf, especially since the exchange situation already favors the substitution of British Empire leaf for American.

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F R U I T S, V E G E T A B L E S, A N D N U T S

UNITED STATES APPLE EXPORTS
LOWEST IN 30 YEARS . . .

Exports of fresh apples from the United States during the 9-month period, July-March 1940-41, amounted to only 739,600 bushels, or about 75 percent below the movement for the same period in the previous season. This volume is the smallest reported in the past 30 years. In the 1917-18 season, which is the second lowest season of exports in this period, they totaled 1,906,000 bushels, the bulk of which moved to Canada. Only 8,000 bushels were shipped to European countries in 1917-18, largely because of the lack of shipping facilities. In the July-March period of the 1940-41 season only 5,600 bushels were exported to Europe compared with a total of 1,890,000 bushels for a comparable period in the previous season and a total of 10,698,600 bushels for the whole of the pre-war season, July-June 1938-39. No apples in barrels or baskets were exported to Europe. Shipments consisted of only 3,800 boxes to Finland and 1,400 to Sweden, with a few boxes moving to other European countries.

Exports to countries outside of Europe also declined during the 1940-41 season, dropping nearly 300,000 bushels or 35 percent below the volume shipped in a comparable period of the previous year. Declines were shown for several groups of countries. Shipments to both Brazil and Argentina, the two most important Latin American markets, declined, in the aggregate, from 238,900 bushels to 99,300 bushels. This is due largely to the fact that these countries made heavier purchases of Canadian apples than usual. For example, the British Columbia Fruit Board reported that around 196,000 boxes of British Columbian Delicious were exported to South America compared with a total of 134,000 boxes in 1939-40. The fact that the Canadian exchange has depreciated to the point where Canadian dollars are at a discount of about 10 percent in terms of American dollars gave Canadian exporters an advantage in several South American countries. Exchange and war conditions generally, including shortages of shipping space, were responsible for the decline in shipments to several oriental countries, including British India, British Malaya, Netherlands Indies, and Hong Kong. Exports to Palestine and Egypt, the leading Mediterranean markets, dropped sharply from 167,300 bushels to only 14,400 bushels due directly to the European war.

Because of the severe decline in exports to the usual foreign outlets for American apples, the Philippine Islands and Cuba were the leading export markets in the 1940-41 season and the only ones accounting for more than 100,000 bushels. Exports to the Philippine Islands were almost entirely of boxed apples from the West Coast producing areas, including Newtowns, Winesaps, and Delicious, while exports to Cuba included both boxed apples from the Pacific Coast, of which the Delicious is the leading variety shipped, and some eastern apples, largely Yorks, in baskets and barrels.

UNITED STATES: Exports of apples by countries of destination
and container, July to March, 1939-40 and 1940-41

Country of destination	July to March				
	1939-40	1940-41			
	Total	Boxes	Baskets	Barrels	Total
	bushels				bushels
	Thousands	Thousands	Thousands	Thousands	Thousands
United Kingdom	1,412.4	a/	0	0	a/
Netherlands	24.8	0	0	0	0
Germany	a/	0	0	0	0
France	0.8	0	0	0	0
Belgium	55.7	0	0	0	0
Sweden	270.3	1.4	0	0	1.4
Denmark	11.3	a/	0	0	a/
Norway	47.0	0	0	0	0
Finland	3.6	3.8	0	0	3.8
Other Europe	64.7	0.4	0	0	0.4
Total Europe	1,890.6	5.6	0	0	5.6
Canada	100.6	20.3	26.1	0.7	48.5
Newfoundland & Labrador...	22.6	12.3	0.3	2.0	18.6
Costa Rica	5.1	5.9	a/	a/	5.9
Panama	17.5	32.5	0	0	32.5
Salvador	3.4	3.6	a/	0	3.6
Mexico	41.7	52.3	0.1	0	52.4
Cuba	118.1	106.3	18.1	0.2	125.0
Dominican Republic	5.0	6.1	a/	0.1	6.4
Netherlands West Indies ...	13.0	13.3	a/	0.3	14.2
Argentina	92.8	2.8	0.8	7.8	27.0
Brazil	146.1	54.9	0	5.8	72.3
Colombia	7.6	9.8	0	0	9.8
Venezuela	25.3	23.0	0	0	23.0
British India	19.2	0.8	0	0	0.8
British Malaya	34.4	26.6	0	0	26.6
Ceylon	7.6	3.2	0	0	3.2
Netherlands Indies	32.6	23.8	0	0	23.8
Hong Kong	36.3	27.6	0	0	27.6
Palestine	106.6	0	0	0	0
Philippine Islands	141.4	128.9	0.1	0	129.0
Union of South Africa	6.5	6.5	0	0	6.5
Egypt	60.7	14.4	0	0	14.4
Other countries	80.1	61.6	1.0	0.1	62.9
Total ex-Europe	1,124.2	636.5	46.5	17.0	734.0
Total all countries	3,014.8	642.1	46.5	17.0	739.6

Compiled from official sources. a/ Less than 500.

UNITED STATES VEGETABLE IMPORTS
CONTINUE AT HIGH LEVEL

Shipments of vegetables from Cuba and Mexico to the United States for the current season, November 23 to April 15, amounted to 169 million pounds, according to reports from American Consul Harold S. Tewell at Habana and American Vice Consul Thomas M. Powell at Nogales. Mexican shipments totaled 92 million pounds, or about 175 percent above exports in a comparable period in the 1939-40 season. Cuban exports amounted to almost 78 million pounds, or somewhat below the exceptionally heavy export of the previous season.

Mexican shipments heavy

Exports of vegetables to the United States from Mexico amounted to 21 million pounds in the first half of April compared with just under 4 million pounds for a comparable period in the previous season. Tomato shipments, of course, accounted for the bulk of the movement. Mexican tomato exports reached a peak of 21 million pounds in the latter part of March, and shipments were expected to decline gradually until around the middle of May. Shipments passing through the port of Nogales during April were of somewhat lower quality than those during the peak of the season. The carrying quality of the tomatoes is expected to deteriorate further as the season approaches the end.

MEXICO: Exports of vegetables to the United States, April 1-15, 1940 and 1941, and November 23 to April 15, 1939-40 and 1940-41

Vegetable	April 1-15		November 23-April 15	
	1940	1941	1939-40	1940-41
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Tomatoes.....	3,048	20,119	25,861	81,673
Green peas.....	0	0	2,649	2,877
Green peppers.....	638	908	4,373	6,789
String beans.....	0	0	1	a/
Eggplant.....	44	92	321	451
Squash	0	0	0	1
Total.....	3,730	21,119	33,205	91,791

American consulate, Nogales. a/ Less than 500 pounds.

The volume of green-pepper shipments was maintained in the first half of April. In fact, exports amounted to 908,000 pounds compared with 639,000 pounds in the comparable period last season. Shipments are expected to decline rapidly in the near future, for the peak of exports has passed and the plants are now beginning to wilt.

Weather conditions remained favorable during the early part of April, and no damage from other causes was reported. From a financial point of view, the 1940-41 season has been one of the most favorable in recent years, largely due to the fact that crops in both Florida and Cuba suffered from unfavorable weather conditions, while little damage occurred in Mexico. Growers of tomatoes and peppers have been especially fortunate in this respect. Shippers of green peas, on the other hand, suffered financial losses during a considerable part of the season because of weak demand conditions in United States markets.

Cuban exports below those of last season

Total Cuban exports of vegetables to the United States up to April 15 amounted to 77,569,000 pounds compared with a total of 107,813,000 pounds to the end of April in the previous season. Exports for the first half of April totaled 5,941,000 pounds compared with 9,398,000 pounds during April 1940. Shipments of peppers were especially heavy in the first half of April, and exports for the rest of the month were expected to continue heavy, since the price and demand situation was favorable. Eggplant shipments were also expected to be heavy. The tomato season has just about reached its end, and only about 5,000 to 6,000 crates were expected to be exported in the latter half of April. April rains damaged the lima-bean crop and, as a result, shipments for April were expected to be below the volume in April 1940.

CUBA: Exports of vegetables to the United States, April 1940, April 1-15, 1941, November-April 1939-40, and November 23 to April 15, 1940-41 .

Vegetable	April 1940	April 1-15 1941	November- April, 1939-40	November 23 to April 15, 1940-41
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Tomatoes	4,960	3,518	77,603	53,390
Eggplant	1,313	731	6,156	6,840
Peppers	1,023	1,235	6,117	7,284
Okra	290	220	1,535	1,268
Lima beans	351	97	7,325	4,141
Cucumbers	67	25	2,515	3,047
Potatoes	1,088	0	4,731	18
Others	306	115	1,831	1,581
Total	9,398	5,941	107,813	77,569

American consulate, Habana.
Gross weights including weight of containers.

MEDITERRANEAN BASIN FILBERTS -
MID-SEASON REPORT

The preliminary estimate of the 1940 Mediterranean Basin filbert production is now placed at 79,500 short tons, unshelled, as compared with 128,700 tons in 1939 and 73,600 tons in 1938. The 1940 production was considerably below the recent 5-year average (1935-1939) of 116,200 tons and the 10-year average (1930-1939) of 106,600 tons.

The production in Italy turned out to have been considerably larger than reported earlier in the season, whereas in Spain and Turkey it was less than had been anticipated. Changes in estimated production of the various countries were to be expected, due to the lack of sufficient reliable data available in the Mediterranean Basin area as a result of the war. It is interesting to note, however, that the total estimated production in the Mediterranean Basin is only slightly higher than the forecast made in October 1940.

FILBERTS: Estimated production in Mediterranean Basin,
unshelled basis, 1929-1940

Year	Italy	Spain	Turkey	Total
	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>
1929	10,000	39,400	10,600	60,000
1930	17,000	10,500	66,000	93,500
1931	26,000	24,000	37,000	87,000
1932	40,000	35,000	56,000	131,000
1933	5,500	14,000	54,000	73,500
1934	26,000	38,000	35,500	99,500
1935	18,000	24,000	71,000	113,000
1936	37,000	26,000	68,000	131,000
1937	26,000	32,000	77,000	135,000
1938	17,000	28,000	28,600	73,600
1939	22,000	24,200	82,500	128,700
1940 a/	30,000	22,000	27,500	79,500
Average:				
5 years, 1935-1939....	24,000	26,800	65,400	116,200
10 years, 1930-1939....	23,400	25,600	57,600	106,600

Estimates of Office of Foreign Agricultural Relations.

a/ Preliminary; revised figures.

The quality of the Italian filberts was very good, and they ran to sizes slightly larger than normal. The spanish crop was rather disappointing, both as to quantity and quality. The indications early in the last growing season were for a large crop; however, by the time

harvesting started a heavy drop had taken place and considerable worm and other damage had occurred to those remaining. The final outturn was 14 percent below the 10-year average (1930-1939).

In Turkey the quality was considered excellent and somewhat better than that of the record-breaking crop of 1939. Production was only a third as large as that of 1939 and the size of the nuts was somewhat larger.

Exports

The exports from Italy were almost entirely to Germany and Czechoslovakia, though small lots were sent to other nearby destinations. Italian wartime restrictions prevent quantitative export data from being disseminated and are, therefore, not available. The demand from Germany for both shelled and unshelled kept the market active up to February.

Quotations at Naples at the end of January 1941 were as follows, f.o.b. railway car:

	<u>Lire per quintal</u>	<u>Cents per pound</u>
Long, extra selected ...	460	10.6
Long, selected	440	10.1
Round, tempestive	400	9.2
Round, tardive	400	9.2
Shelled	900	20.7

The war seriously interfered with the export of Spanish filberts, primarily because of the lack of satisfactory transportation facilities. Exports from the 1940 Spanish crop were further hindered by the unsatisfactory prices and methods of payment. The combined effect of these factors resulted in the smallest volume of exports in years, though no quantitative data are available at this time. It was rumored that 2,200 short tons of shelled nuts had been sold to Switzerland during December 1940; however, the report lacks confirmation at this time. The trade alleges that many orders from abroad, for both shelled and unshelled, have been received but, due to the difficulties in making exports, have had to be declined. This situation also applied to almonds and other agricultural commodities normally exported from Spain. There were some exports of filberts to South America and to the United States. The domestic demand, moreover, made exports less attractive than in pre-war years. The domestic consumption of filberts in Spain since the outbreak of the civil war and to date has increased tremendously, according to reports filtering in from Spain from time to time. This increased consumption is due to the lack of certain other foods.

The control of the filbert industry from grower through to export or domestic sales, as previously stated in these reports, is in the hands of a governmental agency. By a decree law issued December 6, 1940, this agency was ordered to liquidate its stocks by December 31, 1940.

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and to disband. There had been widespread dissatisfaction with this type of control on the part of Spanish growers and exporters, according to information received by the Office of Foreign Agricultural Relations. A National Syndicate is to be organized in the place of the former regulatory body.

The prices posted by the Government agency in December were 4.75 to 4.90 pesetas per kilogram for shelled nuts (about 19.7 to 20.3 cents per pound) and 20.2 pesetas (about 8.4 cents) for unshelled. These prices refer to those paid the agency by exporters and domestic buyers. The exporter must add his profit and expenses to these to arrive at the f.o.b. prices. The exporters were reluctant under existing circumstances to make c.i.f. New York quotations.

It was reported that early in December orders were received from the United States, quoted f.o.b. Vigo basis, as follows:

Common shelled	\$40.50	per metric ton	(18.41 cents per pound)
23/25	44.00	" " "	(20.00 " " ")
28/30	42.00	" " "	(19.10 " " ")

United States import data indicate that approximately 40 short tons of shelled nuts were received from Spain during January, February, and March of 1941, and it is assumed that they were those that were negotiated at the above prices.

Exports of filberts from Turkey were in good volume, going mainly to Germany, Czechoslovakia, the United Kingdom, Switzerland, and Hungary. The usual small quantities exported to the Scandinavian and Baltic countries were not made during this season. The United Kingdom purchased considerably more unshelled nuts than normally in the Turkish market. The German buyers showed considerable interest in the carry-over and in February were negotiating for considerable tonnages. Exporters in Turkey were quoting \$60 per quintal (220 pounds) for shelled nuts (about 27.3 cents per pound), c.i.f. New York.

The Turkish Government actively encouraged the trade to liquidate the carry-over from 1939 as well as from 1940. In order to stabilize prices and encourage exports, filbert exporters in Turkey were urged by the Ministry of Commerce early in 1940 to form an association of exporters, to include all leading exporters. All dealers who do not become members of the association are deprived of the right to make any exports.

Stocks on hand

The estimate of stocks on hand in Italy as of February 1, 1941, is 1,500 short tons, unshelled. The estimate for Spain for the same date indicates that about 6,000 short tons of unshelled were in the hands of exporters, part of which were to fill sales contracts already made. In

addition to those held by the exporters, reports indicated that growers still held an unknown quantity, which had not been delivered to the Government.

The situation in Turkey indicated that about 6,600 short tons, unshelled basis, remained from the 1940 production. It was estimated that there were in addition about 7,100 short tons of shelled from the 1939 crop, of which Germany was expected to buy about 4,700 tons. The trade during February felt that if Germany should buy the quantity then indicated no difficulty would be experienced in liquidating the entire 1939 carry-over and 1940 crop by the time the new-crop nuts came to market. These ideas were based on the conditions that existed at that time. Since February, the war has spread further in the Mediterranean Basin, and as a result it is possible that such a goal may not be attained.

United States imports

United States imports of unshelled filberts during the first 7 months of the 1940-41 crop year amounted to only 34 short tons, as compared with 746 for the same period a year earlier. During both the 1939-40 and 1940-41 seasons the entire imports of unshelled nuts were from Italy. During the current season, the last Italian unshelled filberts admitted into the United States for consumption amounted to 13 tons and were recorded in December.

UNITED STATES: Imports of unshelled filberts, crop-year basis, 1929-30 to 1940-41

Year (September-August)	Italy	Spain	Turkey	Others	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
1929-30	1,900	396	-	124	2,420
1930-31	2,256	211	411	119	2,997
1931-32	3,003	37	-	-	3,040
1932-33	2,987	42	-	22	3,051
1933-34	719	470	88	23	1,300
1934-35	1,173	24	7	4	1,208
1935-36	1,330	374	16	16	1,736
1936-37	2,811	10	-	-	2,821
1937-38	96	8	-	11	115
1938-39	333	-	-	-	333
1939-40	753	-	-	-	753
1939-40 <u>a/</u>	746	-	-	-	746
1940-41 <u>a/</u>	34	-	-	-	34
Average:					
5 years, 1935-1939	1,065	78	3	5	1,151
10 years, 1930-1939	1,546	118	52	19	1,735

Compiled from official records, Bureau of Foreign and Domestic Commerce.
a/ To end of March only.

The imports of shelled filberts during the same period amounted to 494 short tons as compared with 857 tons for the first 7 months of the 1939-40 season. The season's total imports of shelled nuts in 1939-40 was 1,358 short tons as compared with the previous season's imports of 813 short tons. Italian exporters during 1939-40, in anticipation of the action of their Government in June of 1940, shipped as many filberts to the United States as possible, which accounts in part for the increase during the 1939-40 season. United States importers, fearful of what might take place overseas, purchased somewhat more than their normal seasonal requirements.

UNITED STATES: Imports of shelled filberts,
crop-year basis, 1929-30 to 1940-41

Year (September-August)	Italy	Spain	Turkey	Others	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
1929-30	362	1,329	299	123	2,113
1930-31	173	17	1,772	396	2,358
1931-32	173	213	777	90	1,253
1932-33	168	133	1,227	26	1,554
1933-34	20	221	750	11	1,002
1934-35	234	319	447	31	1,031
1935-36	247	210	610	10	1,077
1936-37	535	185	291	120	1,131
1937-38	188	80	632	124	1,024
1938-39	133	20	653	7	813
1939-40	259	79	990	30	1,358
1939-40 <u>a/</u>	215	-	618	24	857
1940-41 <u>a/</u>	39	73	375	7	494
Average:					
5 years, 1935-1939	272	115	635	58	1,080
10 years, 1930-1939	213	148	815	84	1,260

Compiled from official records, Bureau of Foreign and Domestic Commerce.
a/ To end of March only.

During 1940-41 and the two previous seasons, Turkey was the principal source of United States imports of shelled filberts, accounting for 375 tons of the total 494 imported so far this season. The spread of hostilities in the eastern Mediterranean, together with the increasing shortage of shipping space, probably will have a further restrictive influence on imports of filberts. It is likely that imports for the remainder of the 1940-41 season will be insignificant. The 1941-42 imports will depend largely on the availability of shipping space and the war.

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L I V E S T O C K A N D A N I M A L P R O D U C T S

I N C R E A S E D M O V E M E N T O F C A N A D I A N
H O G S A N D P O R K T O U N I T E D S T A T E S . . .

The recent decision of the Canadian Bacon Board to pay packers an extra \$1.00 (Canadian) 1/ per 100 pounds for all hog products put into cure for export, after May 2, 1941, was evidently the result of the greatly increased movement of live hogs and pork to the United States during the first quarter of 1941. Canadian authorities apparently feared that the higher hog prices in this country would attract such a large proportion of Canadian hogs as to jeopardize, temporarily at least, the British supply of Canadian Wiltshire sides.

The reversal in the price relationship between hogs in the United States and Canada in 1941 is the main reason for the fairly large increase in shipments of live hogs and pork to this country from Canada as compared with the low level of a year ago, according to information received from Agricultural Attaché C. C. Taylor at Ottawa. During the period January 1 to April 30, 1941, the number of live hogs exported to the United States from Canada was 10,450 head against only 18 a year earlier. Shipments, however, were much larger in 1936 and 1937.

Bacon-hog prices at Toronto were 35 cents (United States) lower than the price of good and choice hogs (200 to 220 pounds) at Chicago during the first 3 months of 1941, whereas a year ago the Toronto price was \$2.69 per 100 pounds higher than the Chicago price. In western Canadian markets the margin between Canadian and United States prices is even greater, Winnipeg prices being 93 cents and Calgary \$1.13 cents (United States) below Chicago prices. A duty of 1 cent per pound is levied on Canadian hogs entering the United States since 1939 compared with 2 cents prior to that year, whereas fresh or frozen pork is now dutiable at 1.25 cents against 2.5 in the years 1930 to 1938.

Fresh and frozen pork exports to the United States from Canada are not being reported separately at present. In the first quarter of 1941 total exports of pork (excluding bacon and hams) amounted to 4,849,000 pounds against 1,404,000 in the same period of 1940. Last year the United States shipped large quantities of fresh and frozen pork to Canada. In the first 3 months of 1940 exports to Canada amounted to 22 million pounds compared with only 248,000 pounds this year. The Canadian Government on February 26, 1940, placed a quota of 1,627,000 monthly on imports of fresh pork from the United States, and United States exports declined materially. This quota was later extended and expired March 31, 1941.

1/ \$1.00 Canadian equals \$0.88 United States currency.

HOGS: Price margins as related to trade in hogs and pork between Canada and the United States, first quarter, 1934-1941

First quarter	Average hog-price margin, Toronto over Chicago <u>a/</u>	Pork imported from United States	Pork exported to United States	Hogs exported to United States
	United States dollars	1,000 pounds	1,000 pounds	Number
1934...	+4.67	636	200	4
1935...	+0.11	183	553	128
1936...	-1.84	392	2,947	15,430
1937...	-1.83	112	5,589	22,397
1938...	+0.29	518	1,144	27
1939...	-1.34	2,033	700	10
1940...	+2.69	<u>b/</u> 25,601	594	9
1941...	-0.35	<u>c/</u> 600	<u>d/</u>	606

American Agricultural Attaché C. C. Taylor, Ottawa.

a/ Bacon hogs at Toronto and good and choice (200-220 pounds) at Chicago.

b/ Restricted by quota on fresh-pork imports and by cancellation of drawback on exports of equivalent quantities after February 26, 1940.

c/ Estimated. d/ Not published.

The increase in shipments of Canadian live hogs to this country so far this year corresponds with a period of unusually heavy marketing in Canada. Grading of hog carcasses from January 1 to May 1 totaled 2,065,000 head, an increase of 29 percent above the same period of 1940. Marketings in the first 6 months of the hog-marketing year, i.e. October-March, totaled 3,479,000 head, an increase of 40 percent above the same period of 1939-40 and 98 percent above 1938-39.

CANADA: Hogs marketed by months, 1938-39 to 1940-41 a/

Month	1938-39	1939-40	1940-41 <u>b/</u>
	1,000 head	1,000 head	1,000 head
October	299	489	609
November	364	443	651
December	285	433	754
January	284	393	502
February	255	372	497
March	269	354	466
April	256	477	-
May	312	403	-
June	207	324	-
July	208	372	-
August	294	328	-
September	251	413	-

Compiled from Livestock Market Review, Canadian Department of Agriculture.

a/ Gradings of live hogs and hog carcasses at stock yards and packing plants. b/ All graded on a carcass basis at present.

Canada is under contract to supply the United Kingdom with a larger supply of Wiltshire sides during the second war year than in the first and at a lower price. The quantity to be shipped in this second year of the war amounts to 425.6 million pounds, whereas under the old agreement (first war year) only 330 million pounds were shipped. An additional quantity of 28 million pounds has recently been requested. The price agreed upon for the period November 1, 1940, to October 31, 1941, by the Canadian and United Kingdom Governments, based on the new bacon-and-ham grading system, was \$17.72 Canadian per hundred-weight (\$14.38 United States per 100 pounds) for Grade A Wiltshires and \$16.87 (\$13.69 United States) for Grade B. The price for Grade A was about 12 percent below that of the first agreement. ^{1/}

Present indications point to a total of 9,950,000 pigs saved in Canada from the fall and spring crops of the 1940-41 season, June 1 - May 31, according to preliminary estimates of Mr. Taylor. If this number is reached, Canada will have a record pig crop, which will exceed that of 1939-40 by 13 percent. The number of hogs on hand on December 1, 1940, was officially estimated at 6,117,000, an increase of 28 percent above December 1939. Pigs under 6 months increased to 4,132,000, or 28 percent above December 1939, and those over 6 months to 1,985,000, or 27 percent.

CANADA: Number of hogs on June 1 and December 1, 1937-1941, and spring and fall pigs saved, 1937-38 to 1940-41

Year	December 1			June 1		
	Number on hand	Pigs under 6 months	Hogs over 6 months	Number on hand	Pigs under 6 months	Hogs over 6 months
	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>	<u>Thousands</u>
1937	3,680	2,296	1,384	3,963	-	-
1938	3,568	2,340	1,228	3,487	2,496	991
1939	4,770	3,209	1,561	4,294	3,173	1,121
1940	6,117	4,132	1,985	5,382	4,434	1,448
1941	-	-	-	a/ 6,250	a/ 4,550	a/ 1,700
Pigs saved						
	June-November		December-May		Total	
	<u>Thousands</u>		<u>Thousands</u>		<u>Thousands</u>	
1937-38	2,775		2,822		5,597	
1938-39	2,801		3,640		6,441	
1939-40	3,726		5,073		8,799	
1940-41	4,775		a/ 5,175	a/	9,950	

Compiled from official sources.

a/ Estimates of Agricultural Attaché C. C. Taylor, Ottawa.

Inspected slaughter during the period January 1 to April 26 totaled 2,107,000 head, an increase of 39 percent above the same period of 1940. On the basis of present indications, the total available supply

^{1/} See details in Foreign Crops and Markets, December 2, 1940.

of pork in 1941, including end-of-season stocks, estimated production, and imports will total 1,263 million pounds, or 11 percent above 1939. It is estimated that domestic consumption will be approximately the same as in 1940, whereas exports will probably reach 500 million pounds against 353 million pounds in 1940. The recently reported increase in pork consumption, owing to the relative lower price compared with other meats, may require the consumption figure for 1941 to be increased somewhat.

CANADA: Probable pork supply and distribution in 1941,
with comparisons

Item	1938	1939	1940	1941
	1,000	1,000	1,000	1,000
	<u>head</u>	<u>head</u>	<u>head</u>	<u>head</u>
Inspected slaughter.....	3,137	3,628	5,455	a/
Total slaughter.....	4,920	5,422	b/ 7,400	a/
	Million	Million	Million	Million
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Available supplies:				
Stocks, January 1.....	37	27	41	61
Pork production.....	699	774	1,057	b/ 1,200
Imports.....	6	27	38	b/ 2
Total available supplies.....	742	828	1,139	b/ 1,263
Distribution:				
Exports.....	179	195	353	b/ 500
Consumption.....	536	589	725	b/ 725
Stocks, December 31.....	27	44	61	b/ 38

Compiled from official sources. a/ Not available. b/ Estimates of
Agricultural Attaché C. C. Taylor, Ottawa.

WAR REDUCES UNITED STATES PORK
AND LARD EXPORTS TO LOW LEVEL;
IMPORTS INCREASE

United States exports of hog products, especially pork, were reduced to a very low level in the first quarter of 1941, partly due to the war and partly to increased consumer demand and higher United States prices. Imports of hogs and pork, which are normally small, increased materially. Federally inspected pork production was 7 percent below a year earlier and lard production 15 percent smaller. The farm price of hogs has been much higher so far in 1941, and averaged \$2.17 per 100 pounds more than in the first quarter of 1940.

As part of the general-commodities-purchase program of the United States Department of Agriculture, which was extended to include hogs as of April 3, defense purchases of pork and lard amounted to 181 million pounds between the announcement of the program on April 3 and May 8.

Additional purchases are being planned at regular intervals with the purpose of supplying needy families in the United States as well as the requirements of Britain and other countries included in the lend-lease program.

Imports of live hogs and pork, mainly from Canada, increased greatly in the first quarter of 1941, attracted by the higher prices in this country. Pork imports reached 4,342,000 pounds and were over half as large as exports. In addition, Canada marketed over 10,000 live hogs in this country in the first quarter of 1941 against only 18 a year earlier.

UNITED STATES: Imports and production of pork, and farm price of hogs, January-March 1941, with comparisons

Year	Imports				Production	Per-	Average
	Hams, shoulders, and bacon	Pork, fresh or frozen	Pork, pickled, salted, and other	Total (actual weight basis)	of pork meat under Federal <u>a/</u> inspection	centage imports are of production	farm price per 100 pounds of hogs
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent	Dollars
1934	969	182	495	1,646	5,395,287	0.03	4.17
1935	5,297	3,923	1,247	10,497	3,493,838	0.30	8.36
1936	26,088	12,945	2,810	41,843	4,737,148	0.88	9.30
1937	47,422	20,877	6,532	74,831	<u>b/</u> 4,254,173	1.75	9.48
1938	44,347	4,287	3,748	53,382	<u>b/</u> 4,883,851	1.07	7.72
1939 <u>c/</u> ..	36,324	2,274	2,369	40,967	<u>b/</u> 5,552,060	0.74	6.37
1940 <u>c/</u> ..	1,759	3,263	676	5,697	<u>b/</u> 6,614,261	0.09	5.41
Jan.-Mar. 1940 <u>c/</u>	991	474	300	1,765	1,751,479	0.10	5.01
1941 <u>c/</u>	357	3,862	123	4,342	1,630,708	0.26	7.18

Compiled from official sources. a/ Dressed hog carcass excluding lard, bones, and all carcass fat rendered into lard. b/ Revised to use lard production as reported by the Bureau of Animal Industry's inspection service. c/ Preliminary.

The recent decision of the Canadian Bacon Board to pay packers an additional \$1.00 (Canadian) per 100 pounds for cured products for export from hogs purchased after May 2, was designed to reduce exports to the United States. It was undoubtedly feared that increased marketings in this country might endanger the supply of Wiltshire sides Canada has agreed to deliver to the United Kingdom before October 31, 1941. Recent reports indicate that the United Kingdom has requested from Canada an additional 28 million pounds, making a total of 453 million. Pork consumption in Canada also has increased.

Latin America and Japan take over 90 percent of reduced lard shipments

The outstanding features of the lard-export situation in the first quarter of 1941 were the larger share taken by Latin American countries and the relatively large exports to Japan.

Exports to all countries amounted to 53 million pounds, a reduction of 18 percent compared with the same period of 1940. The principal Latin American countries took 32 million pounds or 13 percent more than a year earlier, while Japan took 16 million pounds and the Soviet Union 1 million. Exports to European countries totaled only 3 million pounds, most of which went to Finland, while a year earlier exports to Europe totaled 44 million, 8 million of which went to Finland and 31 million to the United Kingdom. As lard also participates in the general-commodity-purchase program, with other hog products, exports to the United Kingdom and other countries may be expected to show an increase later in 1941.

UNITED STATES: Lard exports and production, 1934-1940,
January-March 1940 and 1941

Year	Exports						Production a/	Per- centage exports are of pro- duction
	Great Britain	Germany	Canada	Cuba	Others	Total		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Per- cent
1934	281,150	26,668	5,355	26,348	91,776 ^b	431,237	1,340,795	32
1935	64,525	1,544	645	24,235	5,406 ^b	96,355	662,060	15
1936	63,547	6,872	2,903	31,011	6,959 ^b	111,292	992,169	11
1937	75,258	2,370	2,193	41,363	14,766 ^b	135,950	c/ 758,515	18
1938	124,810	1,380	1,128	47,454	29,831	204,603	c/ 1,034,193	20
1939 d/..	150,221	370	3,172	55,431	68,078	277,272	c/ 1,272,029	22
1940 d/..	51,246	0	714	67,402	81,952	201,314	c/ 1,527,266	13
Jan.-Mar.								
1940 d/	30,803	0	666	15,767	26,539	73,775	c/ 449,573	16
1941 d/	e/	0	4	19,798	33,027	52,825	c/ 386,579	14

Compiled from official sources.

a/ Rendered lard. b/ Excludes small quantities of neutral lard included with lard since January 1, 1938. c/ Revised figures based on the amount of lard rendered in federally inspected plants as reported by the Bureau of Animal Industry. d/ Preliminary. e/ Less than 500 pounds.

Cuba, Mexico, and Venezuela were the principal Latin American markets for United States lard in the first quarter of 1941. Cuba took about one-third of total exports and Mexico more than one-seventh. Exports to Cuba for the 3-month period this year totaled 20 million pounds and were 26 percent larger than a year earlier. The large exports to Cuba so far this year, which have averaged 6.6 million pounds monthly against 5.3 million a year ago, represent purchases against rising United States prices, according to information received in the Office of Foreign Agricultural Relations. Purchases are reported to have moved promptly into the hands of retailers, as local consumption remained at a high level. Should the price differential in Habana in favor of compound lard be increased to 2 cents instead of 1.5 as reported late in March, the local trade

is of the opinion that compound lard can and will be produced and distributed profitably on a much larger scale than at present, at the expense of pure hog lard. Shipments of lard to Mexico increased 77 per cent to 7 million pounds, while Venezuela took about 3 million pounds.

UNITED STATES: Lard exports, including neutral, average 1935-1939, annual 1939 and 1940, January-March 1940 and 1941

Principal country of destination	Average 1935- 1939	Annual		January-March	
	1939	1939	1940 a/	1940 a/	1941 a/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>Principal European -</u>					
United Kingdom	95,733	150,221	51,246	30,803	41
Malta, Gozo, and Cypress ...	687	2,230	28	28	0
Sweden	829	3,770	2,088	2,044	0
Norway	18	44	18	18	0
Denmark	66	0	0	0	0
Finland	250	732	17,602	8,456	2,782
Total above 4 countries ..	1,163	4,546	19,702	10,517	2,782
Belgium	2,524	8,037	4,157	1,594	0
Netherlands	323	617	304	249	0
Total above 2 countries ..	2,847	8,654	4,461	1,843	0
France	29	29	680	25	0
Switzerland	218	652	936	666	257
Italy	707	1,875	747	376	0
Germany	2,538	370	0	0	0
Czechoslovakia	1,591	519	0	0	0
Other Europe	92	90	75	48	b/1,109
Total Europe	105,605	169,186	77,881	44,306	4,189
<u>Principal non-European -</u>					
Canada	2,008	3,172	714	666	4
<u>Latin America -</u>					
Cuba	39,911	55,431	67,402	15,768	19,798
Mexico	5,499	10,486	22,959	4,046	7,155
Costa Rica	1,186	3,223	2,777	606	702
Dominican Republic	691	1,497	2,185	611	323
Guatemala	395	687	324	60	95
Haiti	645	912	1,005	253	377
Columbia	3,741	15,379	9,591	3,449	293
Venezuela	3,221	11,463	8,570	2,038	2,542
Ecuador	801	2,516	2,196	993	250
Panama (incl. Canal Zone) ..	1,189	2,135	2,413	609	585
Total Latin American ...	57,279	103,729	119,422	28,433	32,120
All other countries	744	1,185	3,297	370	c/16,512
Total all countries	165,636	277,272	201,314	73,775	52,825

Compiled from official sources.

a/ Preliminary.

b/ Includes 1,077,000 pounds exported to the Soviet Union.

c/ Includes 16,035,000 pounds exported to Japan.

Lard exports from the United States during the first quarter of 1941 represented only 14 percent of domestic production, compared with 16 percent in the same period of 1940.

Outlook for cured pork
exports improved

As a result of the provisions of the Lend-Lease Act and the extension of the general-commodities-purchase program to cover pork products, it may be expected that the rate of exports of cured pork in the last three quarters of 1941 will increase materially above the first quarter of this year. Pork exports of all kinds in the first quarter of 1941 amounted to only 8 million pounds and were only 13 percent of the quantity exported in the corresponding period of 1940. There were practically no exports to the United Kingdom and to continental Europe, except to Finland. Fresh- and frozen-pork exports, which were the largest item in the first quarter of 1940, fell from 30 million pounds, going principally to Canada, to only 1 million in the first quarter of 1941. Monthly exports of fresh and cured pork averaged 2.5 million pounds as compared with 20.3 in the first quarter of 1940 and 3.3 in the last quarter. Pork exports averaged less than one-half of 1 percent of federally inspected production in the first quarter of this year against 4 percent a year earlier.

UNITED STATES: Exports of pork, excluding lard, 1934-1940,
January-March 1940 and 1941

Year	Exports						Percentage
	Hams and shoulders	Bacon and sides	Canned (dressed weight)	Pickled	Fresh and frozen	Total a/	exports are of production
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>Percent</u>
1934	65,104	18,261	21,227	18,385	36,758	160,095	2.97
1935	55,380	6,311	15,464	8,276	10,208	95,639	2.74
1936	32,163	4,562	14,431	10,520	2,747	74,423	1.47
1937	39,860	2,999	12,958	9,009	4,238	69,064	1.62
1938	52,216	11,343	15,886	14,082	9,255	102,782	2.10
1939 b/..	57,879	16,360	16,520	14,971	31,246	136,976	2.47
1940 b/..	17,330	14,204	12,202	15,779	39,810	99,325	1.50
Jan.-Mar.							
1940 b/	10,521	9,423	8,252	6,856	29,632	64,684	3.69
1941 b/	1,753	1,585	1,423	2,003	1,343	8,107	0.49

Compiled from official sources.

a/ Includes canned pork converted to a dressed-weight basis.

b/ Preliminary.

UNITED STATES: Exports of pork, bacon, and hams to principal countries, average 1935-1939, annual 1939 and 1940, January-March 1940 and 1941

Item and country	:Average:		Annual		: January-March	
	: 1935-	: 1939	: 1939	: 1940	: 1940	: 1941
	: 1939	:	:	: a/	: a/	: a/
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
Pork, fresh and frozen:	: pounds:	pounds:	pounds:	pounds:	pounds:	pounds:
Canada	4,403:	21,066:	28,269:	21,642:	248	
United Kingdom	5,118:	6,797:	7,044:	7,043:	0	
Others	2,217:	3,383:	4,497:	947:	b/1,095	
Total	11,738:	31,246:	39,810:	29,632:	1,343	
Hams and shoulders:	:	:	:	:	:	:
United Kingdom	42,656:	48,817:	7,719:	7,718:	c/	
Canada	956:	2,490:	2,061:	1,283:	15	
Cuba	2,517:	2,446:	2,724:	628:	661	
Other America	3,036:	3,735:	3,558:	823:	952	
Others	326:	391:	1,268:	69:	125	
Total	49,500:	57,879:	17,330:	10,521:	1,753	
Bacon and sides:	:	:	:	:	:	:
United Kingdom	2,802:	6,517:	7,645:	7,599:	22	
Other Europe	1,519:	3,019:	1,695:	315:	d/ 696	
Canada	978:	3,743:	1,990:	766:	8	
Others e/	3,016:	3,081:	2,874:	743:	b/ 859	
Total	8,315:	16,360:	14,204:	9,423:	1,585	
Pork, other, pickled or salted:	:	:	:	:	:	:
Newfoundland and Labrador	3,310:	3,752:	3,184:	498:	533	
Canada	2,439:	3,260:	3,202:	819:	227	
Cuba	1,262:	985:	1,850:	407:	191	
Other America	2,473:	3,665:	2,989:	1,456:	883	
United Kingdom	1,000:	1,710:	3,439:	3,398:	0	
Others	888:	1,653:	1,115:	278:	169	
Total	11,372:	14,971:	15,779:	6,856:	2,003	
Canned (actual weight):	:	:	:	:	:	:
United Kingdom	7,080:	7,515:	4,022:	3,865:	c/	
Canada	92:	49:	104:	62:	0	
Others	1,106:	1,522:	2,585:	612:	782	
Total	8,278:	9,086:	6,711:	4,539:	782	
Total exports of pork, excluding lard	89,203:	129,542:	93,834:	60,971:	7,466	

Compiled from official sources.

a/ Preliminary. b/ Principally Panama.

c/ Less than 500 pounds.

d/ Principally Finland.

e/ Principally other American.

* * * * *

GENERAL AND MISCELLANEOUSFOOD RATIONING IN SWEDEN 1/ . . .

Sweden is basically almost self-sufficient in foodstuffs and feedstuffs, except for a deficit in fats. The present food situation, despite an unusually short grain crop in 1940, is relatively satisfactory, since considerable carry-over stocks of bread grains, feeds, and butter can be drawn upon.

Ordinarily, all the bread-grain requirements and more than 90 percent of the country's normal feed-grain needs are domestically produced. Normal meat requirements are fully met by domestic production and only to a small extent based on outside feed supplies. Sweden even exports some pork and lard, as well as eggs, and is an important exporter of fish. In regard to sugar and potatoes, the country is virtually self-sufficient.

The main food problem that the war has raised for Sweden so far is fats. Before the war, butter production was equivalent to about two-thirds of the country's aggregate normal fat requirements, but about a fourth of the butter produced was exported. In consequence, about one-half of the fat requirements remained to be covered by imports of oil-seeds and marine oils. The war has eliminated both these imports and also most of the exports of butter. There has been a decline in the output of milk and butter as a result of the 1940 crop shortage and the lack of feed concentrates formerly imported. Total fat supplies from current production are thus expected to cover not more than one-half to two-thirds of normal consumption.

Present ration allowances in Sweden are fairly liberal. The decline in purchasing power, and the increase in prices, have not as yet gone so far as to prevent people from buying their full rations of products of which there is a shortage. Certain groups of the population, especially families with many children, never purchase their full rations of flour and bread, as these rations exceed their normal consumption. Only in relatively few cases are rations foregone because of lack of means.

Prices of most of the rationed foodstuffs are regulated and controlled by a State Food Commission. If the requirements of agricultural protection necessary to assure the maintenance of a high degree of food self-sufficiency cannot otherwise be reconciled with a social policy of consumer protection, the Government is ready to step in with subsidies or price differentiation as one means of shifting the burden of higher food prices onto broader shoulders. Thus, it has been

1/ Cf. articles on Denmark and Norway, Foreign Crops and Markets, May 5 and May 12, respectively.

possible with Government aid to restrict the rise in the price of flour to little over 5 percent since the outbreak of war, even though grain prices paid to farmers were increased by more than 20 percent. Furthermore, a rebate on both butter and margarine is being granted to people of the low-income group, the underprivileged third of the Swedish population. Regulations now in force make it possible for all people to whom a rebate is granted to buy the essential quantity of their edible-fat requirements in the form of vitaminized margarine at a price about 15 percent below pre-war prices.

The table on the following page compares the latest-known rationing data for Sweden with an average pre-war per capita consumption, as well as with a theoretical consumption figure per adult male derived from budget data for "normal households" of peasants, workers, and middle-class families. These budget data should be used with caution, and should be depended upon only in the case of products for which their weighted average checks fairly well with the average per capita figures. The latter should in general be lower than a weighted average of the budget data, since they represent an over-all average, including women and children, whereas the budget data as here given are for an adult-male standard.

It should be noted that there is a basic fallacy involved in any conversion of consumption data into an adult-male standard if the adult-male standard is calculated on the basis of a uniform coefficient which is the same for each of the products considered. Obviously, results will be misleading in the case of foods of which children consume as much as, or even more than, adults. Milk, and perhaps eggs, are cases in point. The adult-male comparisons have been used, for lack of any better readily available basis, in accordance with an established practice for international comparisons. 1/

On the basis of present rations, consumption by the population of Sweden of bread and flour should be little, if any, less than pre-war average consumption. Consumption of fats, meats, and sugar will, perhaps, be as much as three-quarters, or at least two-thirds, of pre-war. Some exports of flour, pork, and butter from Sweden to Finland have been provided for in recent trade arrangements.

Of the unrationed foods, potatoes and vegetables are expected to show higher than pre-war consumption, and fresh milk, eggs, and fish anywhere from 10 to 30 percent less than pre-war. A considerable shortage of fish and eggs has recently been reported, and it appears that this shortage is due to temporarily increased consumption as well as to reduced production. Under wartime conditions, the catch of fish is reduced, while a scarcity of feed, largely due to the unfavorable 1940 grain-crop outturn, has curtailed chicken numbers.

1/ Cf. procedure applied by the International Labor Office (Studies and Reports, Series B, Social and Economic Conditions, No. 23).

SWEDEN: Weekly food rations per person, February 1941 a/

Commodity	Grams	Farmers and self-producers	Heavy workers carrying their lunches	Young people aged 7 to 18: recent pre-war years	Average per capita: consumption over 1932-33	Pre-war consumption per consumption unit of "normal households" b/
Bread, flour, and cereals:						
Flour and groats	1,419	c/	c/	c/	-	-
Or soft bread	1,845	c/	c/	c/	-	-
Or hard bread	1,352	c/	c/	c/	-	-
Oatmeal	37.3	d/	d/	d/	-	-
Milled rice	31	d/	d/	d/	-	-
Total bread, flour, & cereals:						
In terms of flour	e/1,487.3	c/ e/	c/ e/	c/ e/	2,000	1,800
In terms of soft bread	e/1,936	c/ e/	c/ e/	c/ e/	2,600	2,350
Potatoes	Not rationed	f/	f/	f/	2,400	2,000
Sugar	430	430	430	430	600	720
Marmalade, etc.				Apparently not rationed		
Meat h/	500	j/	500	500	800	750
Fish	Not rationed				260	335
Fats (butter and margarine)	250	250	312.5	312.5	360	430
Other edible fats, such as lard, olive oil, etc.						
Cheese	Not rationed				-	-
Milk, whole	Not rationed				120	120
skimmed	Not rationed				1/ 5,120	1/ 5,540
Eggs	Not rationed				k/ 4,550	1/ 150
					m/ 120	n/ 4.5
						n/ 5.5

Rations (1941) as per published information. Pre-war average per capita consumption according to official production, trade, and (where available) consumption statistics. "Normal household" consumption data taken from Statistisk Årsbok for Sverige, 1940, pages 233 and 234.

Footnotes

- a/ The basic rations shown apply to all people, irrespective of age, sex, or occupation, except as stated. It is reported that there are no extra rations for soldiers.
- b/ According to budget statistics (Statistisk Årsbok for Sverige, 1940), originally reported per "normal household," containing 3.3 "consumption units" (adult males 15 years or more). Data here converted into figures per "consumption unit" according to procedure applied by the International Labor Office (Studies and Reports, Series B, Social and Economic Conditions, No. 23).
- c/ Extra rations are being granted to these consumer categories.
- d/ Rations not known.
- e/ Considering all the extras granted, the weighted average ration of all bread, flour, and cereals is probably around 2,000 in terms of flour, or around 2,600 in terms of soft bread.
- f/ It is estimated that average per capita consumption of potatoes will increase to above 2,700 grams per week in 1941.
- g/ Rough estimate of household consumption. Total average consumption (including industrial) may have been around 900.
- h/ Includes all meat and products thereof, except for poultry, game, rabbits, and feet. The ration is free of bone; pre-war consumption data includes bone.
- i/ From April 1, 1941. Previously only pork and canned pork had been rationed.
- j/ All breeders of so-called "household pigs," both farmers and others, are obliged to deliver ration coupons for only 28 kilograms dressed weight of their slaughtered pigs, while the excess quantity of pork obtained from the pig is considered coupon-free.
- k/ Seems high. 1/ The figures per "consumption unit" here given should not be used, and are presented only to illustrate the discrepancies mentioned in the text, because of relatively high consumption by children. Even apart from this factor, the data on milk consumption seem high.
- m/ 120 grams may be from 2 to 2-1/2 eggs. n/ Numbers. Figures seem high. See also note n/ above.

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